

# **Agency User Guide For Results Through Performance Management**

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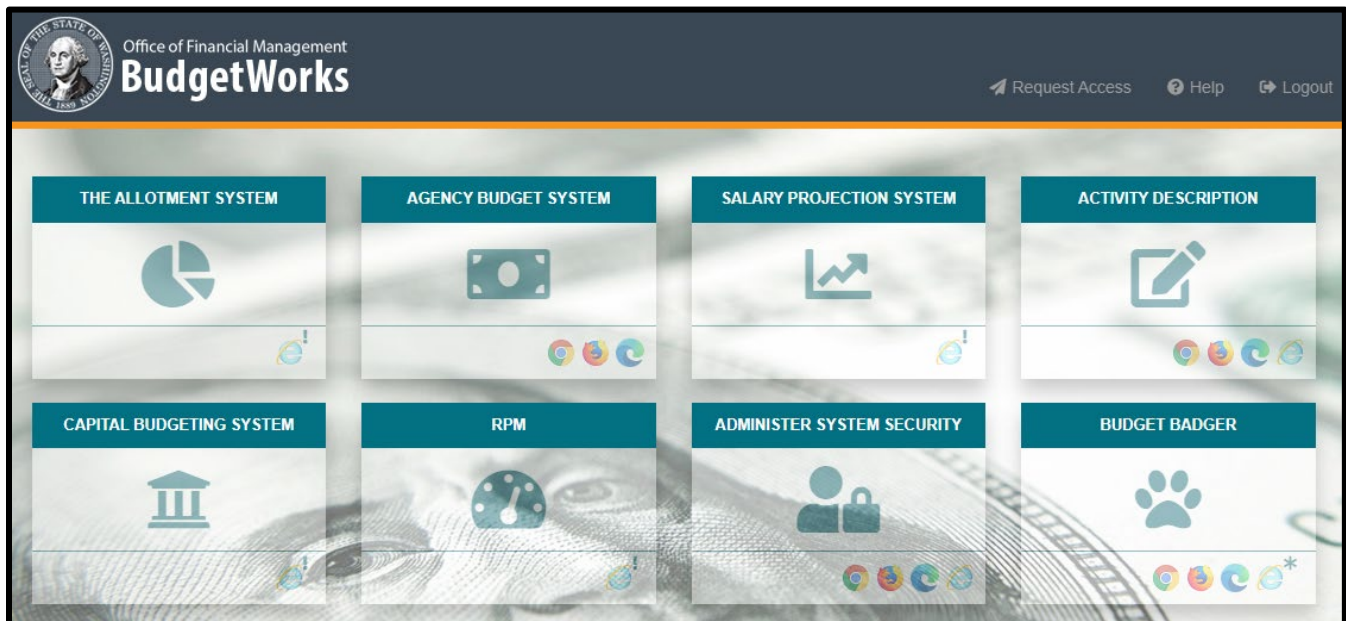
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## Logging On

Open Microsoft Edge or Google Chrome and enter the login address <https://budgetlogon.ofm.wa.gov/Logon.aspx> in the address bar of the browser.

Enter your login ID and password to log into BudgetWorks. If you do not have access please use the [Security Request Form](#) to request it through the OFM Helpdesk at [HereToHelp@ofm.wa.gov](mailto:HereToHelp@ofm.wa.gov). The menu will only show the applications that the user has permission to access.



## Getting to know RPM

The Results through Performance Management (RPM) system contains information on performance measures that can indicate how much, how well, and at what level agencies are providing products or services to customers. A performance measure is based on data and tells a story about whether an agency or activity is achieving its objectives, and if progress is being made toward reaching policy or organizational goals.

### Roles and Permissions:

Depending on the roles requested by the agency, users may not have access to all tabs or actions.

- **Read only:** View assigned agency performance measures, action plans, and scenarios. Add, submit, edit, and delete actions are restricted.
- **Agency Edit:** View and update assigned agency performance measures, action plans, and scenarios with a status of draft or returned. Add, submit, and delete actions are restricted.
- **Agency Operations:** **All performance measure data is provided to view, and update** assigned agency performance measures, action plans, and scenarios with a status of approved with Internal usage type, draft, or returned. Allows access to all agency system features and manage Hierarchy attributes needed to create a hierarchy.

### Main Menu Tabs:

The main menu tabs are viewable by user access, each is linked for further options in that section.

- **[Performance Measures](#):** a list of performance measures and the means to manage measures.

- **Action Plans:** a list of action plans and the means to manage the plans.
- **Scenarios:** create a view of related performance measures for grouping by Topic and Subtopic and the ability to create linkages between measures
- **Themes:** a list of Internal Agency topic areas and the means to manage themes
- **Reports:** ability to create reports of approved or unapproved performance measures in a selected biennium.
- **Settings:** select preferred performance measure status for measures that are part of a hierarchy or scenario. Where more than one status exists for a performance measure, the settings tab will provide an option to include **View Approved** or **View Unapproved** performance measures for those measures that are part of a hierarchy or scenario.


## **Application Tools**

- **Enterprise Reporting:** Shortcut to the Enterprise Reporting login screen to RPM reports
- **Contact:** System support
- **Help:** system documentation and user guides on the OFM website
- **Log-Out:** Log out of RPM
- **Breadcrumbs:** page headers for navigation and returning to a previous page.
- **Show Search:** identify all the performance measures for your agency by Usage Type, Theme, Active, Program.
- **Show Filter:** narrow down and limit the display of performance measures identified in the Show Search selection for your agency by Status, Contains Action Plan, Tracking Period Frequency, Type, and Part of Hierarchy.

## **In-Use Status Rules**

- The system will only allow a single user to have a performance measure or action plan in-use at a time.
- performance measure or action plan needs to be in-use to save changes.
- In-use will be applied to all statuses of the performance measure or action plan (E.g. If an approved pm is in use, then the draft is too.)
- The system will attempt to set the performance measure or action plan in-use when the user enters the performance measure.
- If the performance measure or action plan is already in-use by another user, the user will be notified that the performance measure is in-use by [username] and that the performance measure is read-only.
- The in-use will automatically expire after 120 minutes of inactivity for the measure or action plan.
- The in-use will clear for the measure when the user leaves the measure or action plan.

## **System Features**

- **Saved User Preferences:** system will remember filters and retain selections from each use.
- **Apply:** records the measure changes and remains on current page
- **Save:** records measure changes and navigates back to the previous page
- **Performance Measure Status:** A single measure can have 2 versions,
  - **Approved**
  - **Draft, Under Review, or Returned**
- **‘?’ mark icons for more info:** Throughout the application a blue circle with a question mark icon can be seen. Selecting the icon will display additional information about the related field.
- ** icons for more info:** icon to the right of the title “Custom Search Applied” and “Default Filter Applied”, to view the Search or Filter summary criteria. A message box will display with a close option to display the current search or filter criteria.
- **Tool tips features:** placing the arrow above a title or button (with blue or white font) will display a short sentence stating its purpose or providing additional information about the feature.
- **Column Sort functions:** Performance Measure grid supports sorting on none or many columns.
  - Sorted Ascending (from A to Z or low number to high number) - upward arrow
  - Sorted Descending (from Z to A or high number to low number) - downwards arrow
  - Not Sorted - No graphical indicator

## Review Requirements

A performance measure's flow within the system workflow will depend on its Usage Type and specific changes within the measure.

**Note:** Measures with a status of Draft or Returned can be submitted into the workflow.

**Measures that require an OFM Analyst review** have one of the following characteristics:

- Creation of a new measure with at least one official Usage Type (Budget, GMAP, or Economic Recovery),
- Changing the frequency to an existing official measure,
- Adding an official Usage Type to a previously approved measure.

The system changes the performance measure status from Draft to Under Review for measures with an official usage type that meet the OFM review requirements once a measure has been selected for submittal.

After an OFM analyst reviews the measure, it will be marked as Approved or Returned. A Returned measure will follow the Draft status business rules of the system.

**Measures that will not require an OFM Analyst review** is required to meet one of the following characteristics:

- The measure's only usage type is that of Internal,
- Updates to a previously approved measure with at least one official Usage Type that do not have a change of frequency or official Usage Type.
- A measure that does not require an OFM Analyst review will have their status automatically changed to Approved.

## RPM Tab Options

Please note that some options may not be available depending on the tab, the role of the user, and permissions. Options that are underlined are linked to another section for more details.

### 1. Performance Measure Search Filters

- **Usage Type:** How the PM will be used
- **Theme:** Specific topic or grouping if applicable
- **Active:** PM active or inactive currently
- **Programs:** Agency program, select one or multiple
- **Load Data:** Load the selected filters
- **Reset Default Search:** Clears selections

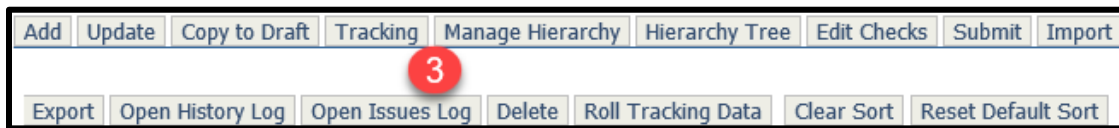
### 2. Performance Measure Records

- **Status:** Chose what PM status to display
- **Contains Action Plan:** Display PM's that contain action plans
- **Tracking Period Frequency:** Measures tracking data collection/reporting frequency
- **Type:** The result type of the PM
- **Part of Hierarchy:** Measures that are linked to other measure Hierarchies

### 3. Performance Measure options:

- **Add:** Add a Performance Measure, required sections will need to be completed and applied prior to other fields availability.

- **Update:** Update an Existing PM or multiple at a time.  
📖 **Note:** Approved and under Review PMs are only available to Agency Operation users.
- **Copy to Draft:** Copy a PM to a new Draft PM
- **Tracking:** View or update tracking amounts for PMs in the Tracking Data screen
- **Manage Hierarchy:** Add a new hierarchy (a mathematical relationship between selected PM)
- **Hierarchy Tree:** View the entire hierarchy of a selected PM
- **Edit Checks:** For a report on errors that might be in PMs that are ready for submittal
  - **Critical:** items need to be updated before the measure can be successfully submitted
  - **Warning:** informational purposes only, measure can be submitted with warnings
- **Submit:** Send draft or returned measures over for OFM review and approval  
📖 **Note:** Measures with an OFM lock cannot be submitted.
- **Import:** Import a previously exported excel spreadsheet of tracking data. No changes are made to items not listed in the spreadsheet
- **Export:** Check a measure to export into an excel document for the biennia selected
- **Open History Log:** View historical actions related to the selected measure
- **Open Issues Log:** View issue log of communication and questions with the agency OFM analyst
- **Delete:** A draft or returned measure with only one usage type can be deleted by selecting the performance measure and **Delete**.
- **Roll Tracking Data:** Roll multiple PMs into a new biennium by batch process
- **Clear Sort:** Clear all ascending/descending filters
- **Reset Default Sort:** Clears all sorting filters and displays by default



4. **Performance Measure Grid:** Displays a checkmark or details contained in the Performance Measures. Items are described in separate linked sections below.  
📖 **Note:** A locked measure will show a lock next to the Lead Agency column, linked action plans cannot be updated, and locked performance measures cannot be submitted.

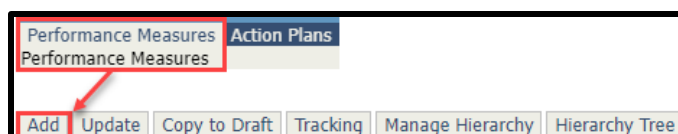
Lead Agency	Number	Title	Status	Budget	Economic Recovery	GMAP	Puget Sound	Internal Frequency	Type	Contains Action Plan	Contains Unresolved Issue	Is Parent	Is Child
<input type="checkbox"/> Locked	121		Approved	✓				Quarterly	Output				


## Performance Measures

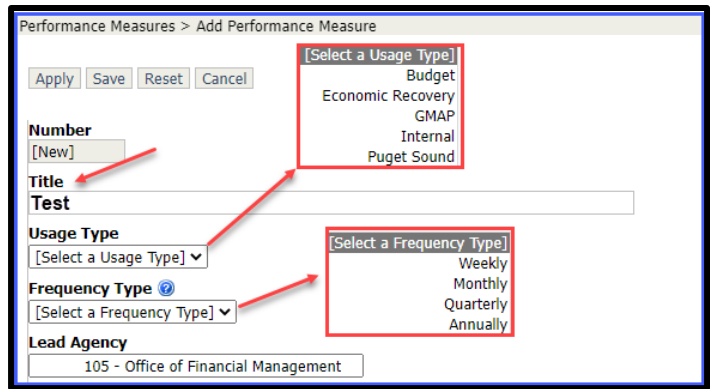
Performance measures make accountability possible. Information about the effectiveness of an activity purchased in the budget is important to gauge whether the investment has proven worth the cost. Analyzing performance can help agencies and analysts recognize how to improve performance outcomes and whether other strategies can contribute more toward achieving activity and statewide results. Current Performance Measure requirements can be found in [Budget instructions - operating and transportation | Office of Financial Management \(wa.gov\)](#).

### Add a Performance Measure

In the Performance Measure tab, select **Add** in the [Performance Measure Options](#). This will open the **Add Performance Measure** screen to complete the required fields.



- **Title:** short title for the measure, it is editable until the measure is approved.
  - **Usage Type:** What the measure will be used for
  - **Frequency Type:** How often the PM will be automatically updated. Quarterly reporting is recommended for the best data results.
  - **Apply** to continue to **Manage a Performance Measure** or **Save** to go back to the PM screen.
-  **Note:** The **Number** will be automatically assigned and read-only when the fields are completed and **Apply/Save** is applied.

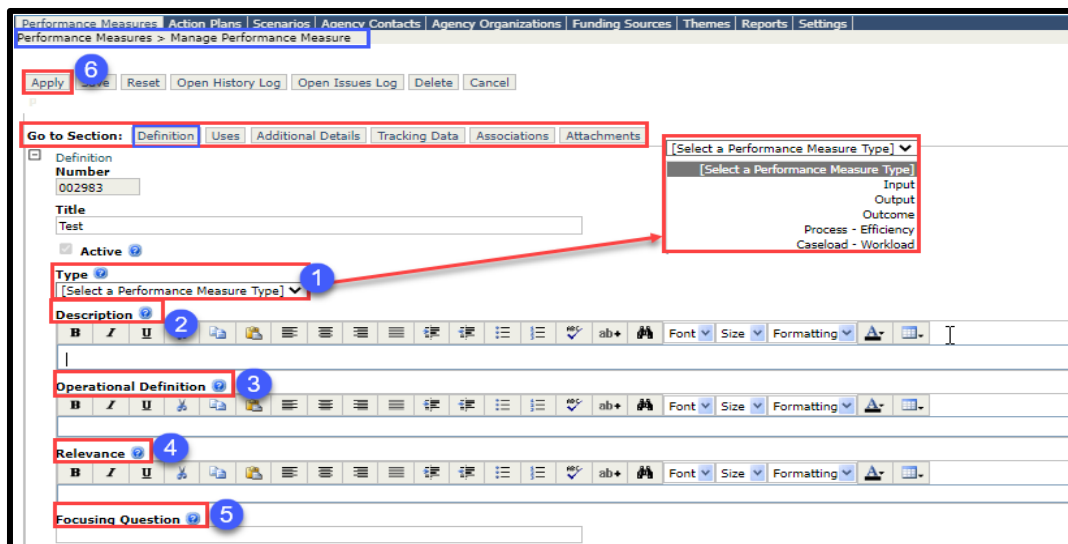


## Manage a Performance Measure

This screen is broken up into different sections which will **Show All** if checked beside the icon or collapsed if unchecked. Each item can be shown or collapsed individually at the top by clicking on the + or – sign. The sections can be jumped to by using the **Go To Section** at the top of the screen, the sections are listed and defined below.

### Definition

1. **Type (Optional):** Identifies the point where the performance measure is measured in the business process.
  - **Input:** A measure of resources used by an activity or process. Some inputs relate to workload, others relate to the amount of resources used in a process. Ex.: Applications received, Dollars spent, Staff hours used.
  - **Output:** The number of units of a product or service produced or delivered. Ex.: Eligibility interviews conducted, children immunized, number of non-compliant woodstoves replaced.
  - **Outcome:** Measures of ultimate benefits associated with a program or service. Ex.: Reduction in deaths, Improvement in air quality in areas with wood-stove compliance program.
  - **Process-Efficiency:** Describe aspects of the business process, such as completion rate, processing time, backlog, error rates, and so on. Ex.: Days to issue a permit.
  - **Caseload-workload:** Measures of customer demand received by a business process. Ex.: applications per month, filings received per week, clients per caseworker.
2. **Description (Optional):** A statement or narrative describing the Performance Measure. Changes can be made until the measure is approved.
3. **Operational Definition:** A description or definition of the Performance Measure. The operational definition should state how the performance measure was calculated, what is the numerator and denominator.
4. **Relevance:** Identifies why the performance measure is important
5. **Focusing Question:** Assists leadership identify the specific data to review and why it is important.
6. **Apply:** Select **Apply** to move to the next item or **Save** to close and return to the PM screen.





## Uses

Budget, Economic Recovery, GMAP, Internal, and Puget Sound identifies how the measure will be used. Official usage types are Budget, Economic Recovery, GMAP and Puget Sound. Internal usage provides a means for agencies to create agency only measures which include an internal usage for official measures. A measure is required to have at least one usage type, but an agency can include all five. When a measure is shared by multiple agencies, the lead agency will determine measure usage types for all agencies.

- Usage Type:** Identifies the reason why the measure was created and which areas the measure supports.
  - Note:** Approved usage types can only be edited by Operations, which can add or remove additional types.
- Related to Economic Stimulus:** This will be automatically updated when the Economic Recovery usage type is selected.
- CFDA, Catalog of Federal Domestic Assistance (Optional):** A government-wide consortium of federal programs, projects, services, and activities that provide assistance or benefits to the American public.
  - Set/Unset Supported:** Select measures that are in support of the CFDA and click the set icon or select measures that are checked and do not support CFDA and click the unset icon
- Themes (Optional):** Identify measures by associated topic, each usage type has different themes, and the themes available will be based on usage types. None to multiple themes can be created and is in draft status until the measure is approved.
  - Ex:** Air pollution, water pollution, and ground pollution can be grouped into a theme for “Toxins” by the agency. Users can then associate other measures with that theme.
  - Set/Unset Supported:** Select measures that are in support of the Theme and click the set icon or select measures that are checked and do not support Theme and click the unset icon
  - Note:** An Internal Usage Type status is required for Internal Themes to be available
- Apply:** Select **Apply** to move to the next item or **Save** to close and return to the PM screen.

## Additional Details


The performance measure **Additional Details** section captures the analysis and data from the **Definition** information and more. For current instructions and requirements for writing a good performance measure, refer to the [Budget instructions - operating and transportation | Office of Financial Management \(wa.gov\)](https://www.wa.gov).

**Note:** If there are changes made to a measure **Apply** the changes **before** clicking on the Add/Update icon.

- Contacts:** add and update (or remove) agency contacts and their roles if OFM needs to reach out for questions or more information.
- Geographical Location:** Geographic Location provides a means to identify the Location relevant to the performance site.
  - Add the address, zip code, county, city
  - Choose the Legislative District

- Enter the location description
  - Either enter in the latitude/longitude or
  - use the link provided, which will open a new window
    - Select the link to the site that converts the address to latitude/longitude, or it can convert the latitude/longitude to an address
3. **Summary Analysis** (Optional for submittal): Identifies a high-level summary of the explanation and analysis of the performance on the performance measure. It will be in draft status until the measure is approved.
- **The Summary should:**
    - Answer the focusing question
    - Include main data in one or two sentences
    - Highlight most important in 1-3 points, first being most important
    - Be updated for each report (assuming there is new data or information available).
    - **Not** include uncommon acronyms or technical language
  - **Areas to consider including:**
    - What the data shows
    - Why is it important or why it matters
    - What factors have influenced past and future trends/trend lines
    - What caveats or problems it may have
4. **Detailed Analysis:** (Optional for submittal): Provides space for further analysis or background information that is in addition to, or expansion of the summary analysis. It will be in draft status until the measure is approved.
5. **Notes (Unpublished)** (Optional for submittal): Provides space for details such as footnotes, in draft status until the measure is approved.
6. **User Defined Field:** (Optional for submittal): Provides space agency unique text, in draft status until the measure is approved.
7. **Action Plans:** Action plans are only added within a performance measure but once created can be linked to other performance measures. Usage Types can be added but once added can only be removed by OFM Budget Operations. To add additional measures to the open performance measure a filter can be used to narrow down results. See [Action Plans](#) for more details.

- **Requirements:**
  - Tile
  - Usage Type: Identify the business process the action plan supports. Available types depend on those selected for the performance measure.
  - Person Responsible
- **Optimal**
  - Specific task
  - Who it will be done by
  - When it will be complete

 **Note:** Tasks that are part of an ongoing strategy should be included in the **Additional Details; Detailed Analysis** section.

The screenshot displays the RPM system interface with several sections highlighted by red circles and arrows:

- 1:** Points to the 'Contacts' section header.
- 2:** Points to the 'Geographic Locations' section header.
- 3:** Points to the 'Summary Analysis' section header.
- 4:** Points to the 'Detailed Analysis' section header.
- 5:** Points to the 'Notes (Unpublished)' section header.
- 6:** Points to the 'User Defined Field' section header.
- 7:** Points to the 'Action Plans' section header.

On the right side of the interface, there is a 'Performance Measure' sidebar containing fields for Agency, Contact, Roles, Address 1, Address 2, Zip Code, County, City, Washington Legislative District, and Description. At the bottom of the sidebar, there are fields for Latitude Degree and Longitude Degree, with a link to 'Find Latitude/Longitude Information (opens a new window)'.

## Tracking Data


OFM's performance measure tracking system allows agencies to add historic data by adding a biennium, then choosing a previous period. This will create places to enter historic data.

Targets express to the reader what good performance should be. Readers compare targets to actual performance to judge if performance is where they want it to be. Actual performance capability is a term for the performance level being achieved by an activity or business process. This is what the organization is capable of doing or achieving under status-quo conditions. If there is a large gap between the target and actual performance capabilities, the assumption is that management is working on a solution to bring the two performance perspectives into alignment.

Enter data for a performance measure in the quarter during which services were provided. Data is due within one month following the performance period. For quarterly data, this is by the end of the months of October, January, April, or July. If data cannot be collected and reported within 30 days, the agency should include a footnote that describes the expected time lag to receive and report the data. Another approach to such lagged data is to enter estimates and preliminary actual amounts in the quarter when services are provided and indicate in the "Comments" field that the data are preliminary. When final data are available, revise the actual amounts and indicate in the "Comments" field that the data are final and the date when they were revised.

Typically, internal audiences are interested in process-level measures and production outputs. Surveys may be measurement tools of last resort for qualitative subjects that defy attempts to measure them quantitatively, such as customer satisfaction. Survey scores can be useful to internal audiences, but usually mean little to external audiences. To create meaningful Targets, an outline of the steps are described in the [OFM Performance Measure Guide](#).

1. **Unit Type:** Select the unit type to measure; Number, Dollar, Percentage, Qualitative
  - **Examples:**
    - **Number:** How many people, products or processes used
    - **Dollar:** Cost total or per unit
    - **Percentage:** Percent of success rate, participation, or turn-around time
    - **Qualitative:** Survey or other quality results
2. **Unit Label:** Add a more descriptive title for reports
3. **Target Range:** If selected will generate an option for upper or lower target of the performance measure improvement priority depending on resources for that target.
 

 **Note:** If a target is a range and the user changes the target to "not a range" the system will use the lower target value. If a target is not a range and the user changes to a range the system uses the value for the lower and upper target values.
4. **Is Ratio:** Ratios allow a measure is to be composed of two numbers: a numerator (e.g. applications completed per period) and a denominator (e.g. total applications under review per period).
  - If checked:
    - Numerator and Denominator fields are provided for actuals.
    - Two additional fields are provided for additional information on Reports and Titles entries which will display on the tracking data input screen as column header titles (optional).
5. **Frequency Type:** Rate of data collection for the measure, only one rate can be selected for the entirety of the biennium.
  - **Weekly:** Weekly tracking starts on Sunday
  - **Monthly:** Monthly starts on the 1st of the month
  - **Quarterly:** Three-month cycles; July, October, January, and April. Quarterly reporting is preferred as it provides sufficient data points and information.
  - **Annually:** About a decade of tracking is needed when tracking annually.
6. **Precision:** How many places after the decimal are to be used for the measure, 0, 1, or 2 is preferred.

**Note:** Decimal places will truncate when the level of tracking amount precision is decreased. If a user decreases the level of tracking amount precision, the system will warn the user that data will be truncated.

7. **Direction of Success:** The direction of performance results; increasing, decreasing, or no change (optional)
  8. **Tracking Periods:** Displays the tracking period end date.
    - **Biennium:** Current budget process biennium, which contains the tracking period biennium for the performance measure. If the field is blank add the biennium by selecting Create Biennium.
    - **Period:** Numeric indicator related to the sequence of end dates; system generated
    - **End Date:** The date the measure period ends, by month/day/year; system generated
    - **Actual:** Actual performance for the measure period, numeric with decimal or with ratio measure use numerator/denominator.
    - **Target:** Estimated target of future performance achievement, regardless of strategic intent and implementation of any changes.
    - **Estimate:** Estimate of future performance, estimates are not included in RPM reports
    - **Comment:** An option to add information about the data
- Note:** Click **Apply** to change the measure prior to Add/Create/Delete the Biennium. See [Roll Tracking Data](#) for Bulk Updates
9. **System Data Pulled From:** Add a cite, preparer, system, or report to source of the data.
  10. **Date Data Current As Of:** Last update (based on source data) date. Use to display the lag time in the data measures.

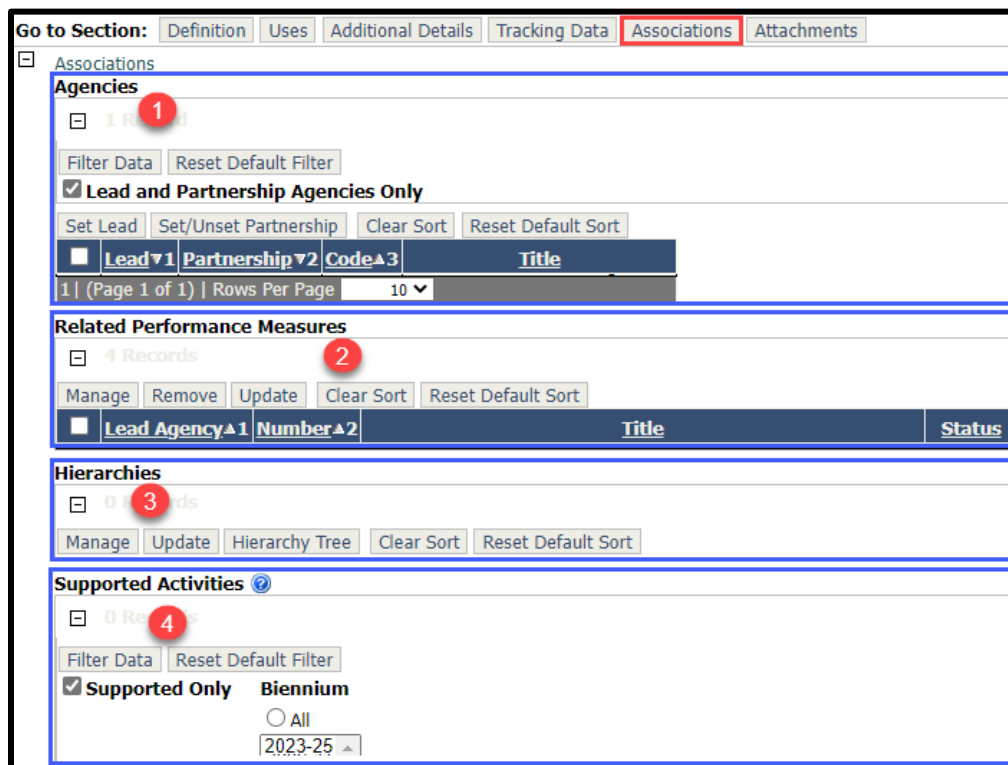
## Associations

This section allows a performance measure to be associated with different areas of interest to the agency, including; budget Activities, agency programs and sub-programs, and partnership agencies for GMAP.

1. **Agencies:** Add a lead agency which is required per measure.
  - **Lead and Partnership Agencies Only:** Joint owners with access to the measure
    - **Lead:** Primary responsibility of the measure
    - **Partnership:** Any agency that contributes to the measure
2. **Related Performance Measure:** Option to add any measures with contextual or direct relationships to the current measure.
3. **Hierarchies:** A hierarchy in the RPM system is a mathematical link 'parent-child' relationship between performance measures. This system feature will allow for the more detailed entry of performance data (at a

program, region, or office level) and the ability to aggregate and display the performance data at an agency/statewide roll-up level.

- **Manage:** Add or remove a child measure
  - **Update:** Update a performance measure in the hierarchy
  - **View:** Outline report of all performance measures in the hierarchy
4. **Supported Activities:** Select any or all Budget Activities that support the measure. If the measure contains a Usage type of Budget, then at least one Activity from the current biennium for the lead agency is required to be selected prior to submittal. Other Usage types can contain Budget Activities but is optional for submittal.
- **Biennium:** Select the biennium for the selection of Activity Descriptions
  - **Set/Unset Supported:** Link or unlink supported Activities, if an activity is locked, unset is unavailable.
  - **View:** Opens a report of Activity Descriptions from RPM



- 5. **Programs:** Add or remove agency programs that support the measure
- 6. **Subprograms:** Add or remove subprograms that support the measure, only subprograms tied to selected programs will populate for selection.
- 7. **Organizations:** Add an Organization to the performance measure
  - Select a current organization
  - Add an organization
    - Add will open another screen; enter a title, abbreviation, email address, and the type of organization
    - Apply or Save Changes
- 8. **Total Cost Estimate Amount:** Add an estimated cost for the Activity Descriptions, programs, and subprograms if applied to the measure.
- 9. **Total Cost Estimate Amount Comment:** Add any comments about the cost estimate that should be considered for review.
- 10. **Funding Sources:** If there are costs associated from the above selections, add the source the funding is coming from.

## Attachments

Attach files and links to other documents to a measure, such as background information, reports, maps, and web sites. For instance, a hyperlink can provide a reference to a goal or objective in the agency's strategic plan (if this is provided on the agency's web site).

- Files:** Select Add, chose the file by browsing in File Explorer, add a description, and save. Accepted file types include: Microsoft Word (doc, docx,) Excel (xls, xlsx), PowerPoint( ppt), Project (mpp), Adobe Acrobat (pdf), and some image files (gif, png, jpg, jpeg, tif, tiff | Maximum File Size: 3 MB).
- Hyperlinks:** Select Add, enter the URL (web site address), add a description, and save.

## Update a Performance Measure

Updates in Performance Measures can be done any time prior to submission. If updates are needed after the measure was submitted the agency's OFM Budget Analyst will need to be contacted for any changes. During the draft status, all details can be updated with the exception of the Performance Measure's Number which is automatically assigned upon saving a new measure. Instructions on any of the sections can be found in [Add a Performance Measure](#)

## Copy to Draft

A performance measure copy can only be created with an **Internal** use type and an **Approved** status. Only one **Draft** status per performance measure can be created. If the draft is submitted and the status is **Under Review** another draft cannot be created.

**Note:** When a draft measure is **Approved** it will overwrite the original performance measure details with the drafted information.

**To make a copy:** From the **Performance Measure** screen, select an **Internal** use **Approved** performance measure and click the **Copy** icon. Instructions on any of the sections can be found in [Add a Performance Measure](#).

## Tracking Management

Tracking is initially set up when creating a new performance measure, Tracking details can be found above in [Tracking Data](#). Ensuing biennia are not automatically added to the Tracking Period Biennia dropdown list, they are created by the agency for each measure in need of the new biennia.

### Update tracking on existing performance measure

1. Select the **Tracking** icon on the **Performance Measure** screen.
2. **Create Biennium:** Choose a new biennium for tracking, Complete these steps for each measure in need of the new biennia. **Note:** if multiple measures were selected, use the navigation arrows to advance to the next record to update the Tracking Periods section.

**Note:** After the above steps have been completed, the **Biennium** is required to be selected from the dropdown list then **Filter Data** to switch between biennia in the Tracking Periods section.


3. **Delete Biennium:** Delete an existing biennium to create a new biennium or update the tracking frequency to or from **Annually** or **Quarterly**

Period	End Date	Actual	Target	Estimate	Comment
1	6/30/2018		100		
2	6/30/2019		100		

### Import / Export existing tracking data into a new biennium

To import data into a new biennium the exported data is required in an existing approved measure and imported into a performance measure that is in draft or returned status. If the data needs to be imported into an approved measure copy the approved measure:

1. Select the measure that is to get the imported data and click the **Copy to Draft** icon
  2. Select the measure that has the data and click **Export**
  3. Select **All** to retain all data, **Export**, and **Save**
  4. Save the Excel export to a chosen file location, enter a **File Name** and **Save** or **Cancel** to exit the screen
  5. Select the copied performance measure and click **Update**
  6. **Delete Biennium** to clear any existing data in the performance measure and repeat until no other periods remain
  7. Update to the preferred **Frequency Type** and **Apply**
  8. **Create Biennium** to add as many biennia as needed (additional instructions above) and **Save**
  9. Locate the Excel file with the export tracking data and open the file to manage the data. Verify that the new frequency period end date for each biennium exists in the spreadsheet with the correct tracking data. Delete the now-unused quarter rows, leaving rows with annual data in them. **Save** and **Close** the file
- Note:** Do not delete the first row of the spreadsheet, or any columns within the spreadsheet. This information is needed for the import process to complete. These fields are optional Title, Status, Frequency, Biennium, and Period and can be left blank.

10. On the Performance Measure List screen, select the **Import** button.
11. Select the **OK button**, to overwrite tracking data in the *draft* instance of the measure. The approved versions tracking data will not be changed on the import.
12. Select **Browse**, locate the excel file to import and **Open**. The file path will display to the left of the Browse button, then select the **Import** to complete the import process.
  -  **Note:** If any errors are detected on the import, an Import Error Report will be displayed. All import error will need to be cleared prior to a successful import. Official OFM budget measures that have tracking period changes will need to be submitted to and approved by OFM.

Number	Title	Status	Frequency	Biennium	Period	End Date	Actual	Actual (Numerator)	Actual (Denominator)	Target	Target (Lower)	Target (Upper)	Estimate	Comment
002985		Test Draft	Annually	2023-25	1	6/30/2024								
002985		Test Draft	Annually	2023-25	2	6/30/2025								

## Roll Tracking Data to update tracking on multiple measures

1. Select any performance measures that are in **Draft** or **Returned** status to update the biennium, then select the **Roll Tracking Data** icon on the menu bar.
2. Select the appropriate biennium from the list and click **Create** to execute the roll of data or **Cancel** to return to previous page.
3. Once the **Roll Tracking Data** is complete the user will receive an email to confirm a successful or unsuccessful roll of performance measures.


## Hierarchy

A hierarchy in the RPM system is a mathematical link ‘parent-child’ relationship between performance measures. This system feature will allow for the more detailed entry of performance data (at a program, region, or office level) and the ability to aggregate and display the performance date at an agency/statewide roll-up level.

A hierarchy can have only one top level parent (top level roll-up), but it will provide for the ability to have mid-tier roll-up levels. The lowest level measures, where tracking data is entered, can roll-up to mid-tier levels; those mid-tier roll-up levels can roll-up to the top (parent) level total for all linked performance measures.

## Create a Hierarchy

When a hierarchy is created there are elements that are automatically inherited and locked in a read-only status in the inherited measure. These [Inherited elements](#) are listed below.

1. **Add** a new measure and check the box on the line of the new measure
2. Select the **Manage Hierarchy**
3. A message will appear; ‘This action caused a new hierarchy to be created. The following fields will not be updateable: Target Range or Target Selection, Ratio or Non-Ratio Selection, Precision, and Frequency. Are you sure you want to continue?’ Select the **OK**
4. **Select the Hierarchy Type:**
  - **Summary** hierarchy: data at the parent measure level will be the sum of the children measures
  - **Average** hierarchy: data at the parent measure level will be the average of the children measures.
    -  **Note:** When a hierarchy type **Average** is selected, the calculation for each period will be a straight average of all child elements which have a non-null amount. Parent amounts will not be used in the calculation.
5. Retain default checkmark for **Rollup Estimates and Targets**; Checked identifies whether the Estimates and Targets at the Parent level will be a sum total of the child measure Estimates and Targets. Target and estimate values are read-only at the parent. Or **Uncheck**; Unchecked identifies then the **Estimates and Targets** values may be edited at all levels in the hierarchy. **Save**

## Set a Child Hierarchy

The hierarchy attributes are now established, the Manage Hierarchy screen and performance measures available to be linked to the hierarchy are displayed.



**Note:** A measure is required to be selected and set as a child to complete the establishment of the hierarchy. See [Hierarchy Tree](#) for Parent/Child Measure links and Hierarchy Tree Actions

1. Select the checkbox of the measure, to be set as a child in the hierarchy, then **Set/Unset Child**
2. A message will appear; 'Making the selected performance measures children in the hierarchy will change the following fields to match the parent: Description, Operational Definition, Relevance, Unit Label, Ratio Numerator Title, Ratio Denominator Title.' This is stating if the measure being selected to be a child in the hierarchy has values for any of the listed fields, they will be overwritten to display the values of the parent for the listed fields. Click **OK** and **Save**
3. To continue building the hierarchy. Select an existing performance measure check box then the Set/Unset Child button or select the 'Add New Measure as a Child' button.

**Note:** Actuals are always rolled up for each selection. Only the lowest level of the hierarchy will allow for entering data for actuals. Updates to the Tracking Data in the child performance measures will be reflected in the rollup totals of the parent for all items in the hierarchy based on the Settings tab selection for Preferred Performance Measure Status.

### Inherited Elements

#### Definition Section:

- Measure Type
- Description
- Operational Definition
- Relevance

- Unit Label
- Frequency
- Precision
- Direction of Success
- Target Range
  - Target selection
- Ratio or non-Ratio selection
  - Ratio numerator title
  - Ratio denominator title

#### Usage Section

- Usage Type

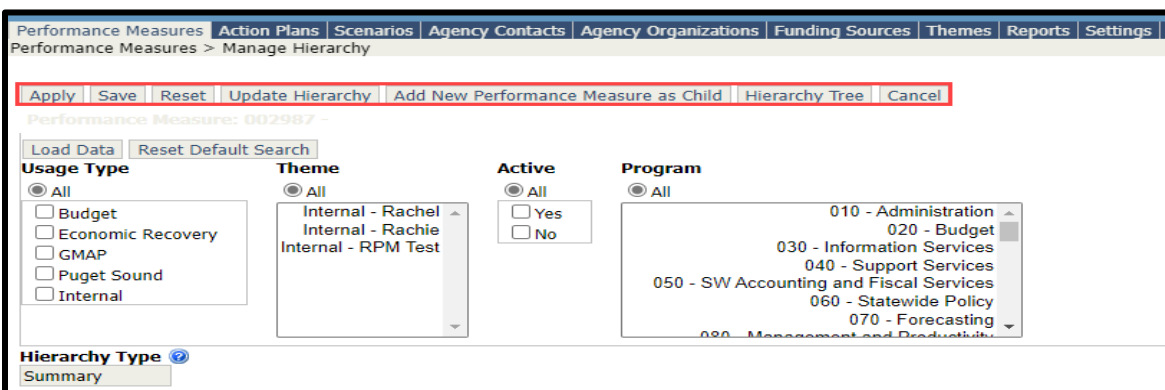
#### Tracking Data Section:

- Unit Type

## Manage A Hierarchy

1. Select the performance measure from the **Performance Measure List** screen.
2. Check the box of the measure and click on the **Manage Hierarchy** icon.
 

**Note:** The measure cannot contain tracking data, this applies to the Approved, Draft, and Review statuses
3. **Apply:** Changes are saved and stays on the current screen
4. **Save:** Changes are saved and navigates back to the previous screen
5. **Reset:** Default settings are restored
6. **Update Hierarchy:** Displays the **Hierarchy Type, Roll-up Estimates and Target** options
7. **Add Measure as Child:** Create a new measure as a child of the current measure in the hierarchy
8. **Hierarchy Tree:** Displays an outline view of the measures in the hierarchy
9. **Cancel:** Changes are not saved and navigates back to the **Performance Measure List** screen



### Manage Hierarchy Search Options:

1. **Load Data:** When changing any of the search criteria select the criteria then select the LOAD DATA button to finalize the selections.
2. **Reset Default Search:** the Reset Default Search button selects All Usage Types, All Themes, Only Active measures, and All Programs.
3. **Hierarchy Type:** read-only, displays rollup selection of sum or average. Modifiable by using the Update Hierarchy button.
4. **Rollup Estimates and Targets:** Read-only, a Check in the box indicates a yes to rollup. Modifiable by using the Update Hierarchy button

**Performance Measures grid:** a list of available measures that can be selected to be included in the hierarchy.

1. **Set/Unset Child:** ability to define a parent child relationship within a Performance Measure. Provide the ability to unlink a child from a parent.
2. **Clear Sort:** clear any sort selections in the grid.
3. **Reset Default Sort:** resets default sort order of grid.

### Columns:

1. **Parent:** A checkmark identifies whether a measure belongs to an existing hierarchy as a parent level measure.
2. **Child:** A checkmark identifies whether a measure belongs to an existing hierarchy as a child level measure.
3. **Has Children:** A checkmark identifies whether the current measure has children in the hierarchy.
4. **Lead Agency:** The lead agency of the performance measure. An associating agency is required in the parent before it can be added to a child measure and the child agency needs to be removed before the parent agency can be removed.
5. **Partnerships:** Partnership agencies of the measure.
  - Note:** A parent measure in the hierarchy needs to contain all children measure agencies (if a child contains an agency, it is also required in an existing parent measure). Each performance measure in the hierarchy can have a different lead or partnership responsibilities.
6. **Number:** Performance measure number.
7. **Title:** Performance measure title.

## Hierarchy Tree

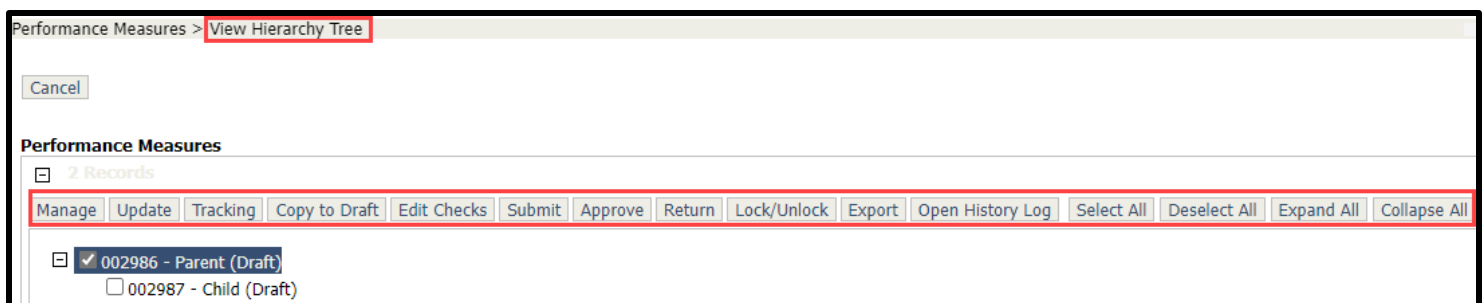
The Hierarchy Tree displays all of the performance measures in a hierarchy in an outline view. The view shows the parent (higher level) to a measure in the hierarchy. The performance measures are listed by number and title, and the measure status is displayed in parenthesis.

**Note:** When more than one status exists for a performance measure, the measure displayed will be based on the **Preferred Performance Measure Status** selection on the Settings Tab.

## Manage Hierarchy Tree Options

Expand (+) or Collapse the (-) to view the issues. The child measures are displayed when expanding the parent measure.

1. **Manage:** Select a measure and navigate to **Manage Hierarchy** to set/unset child measures (that do not contain tracking data)
  2. **Update:** Select one or more measures to update the measure details
  3. **Tracking:** Select one or more measures to update tracking data and comments
    - Measures with tracking data are read-only, the hierarchy display is grayed out.
    - Update **Comments** for none or all measures when biennia has been added
  - 📖 **Note:** If multiple measures have been selected, **Save on Navigation** is marked Yes. Any updates are saved prior to navigating to the next measure. Uncheck **Save on Navigation** to use **Save** or **Apply** after changes.
  4. **Copy to Draft:** Select one or more measures to create a working copy of an approved measure. Only measures with a status of Draft or Returned can be updated.
  5. **Edit Checks:** Select one or more measures to run edit checks, which displays a report listing critical and warning messages for those measures
  6. **Submit:** Select one or more measures to submit to OFM for approval
  7. **Import:** Import the exported excel tracking data to another measure
  8. **Export:** Export tracking data from performance measures to an excel worksheet .
  9. **Open History Log:** Select a measure to view its modification history.
  10. **Select All:** Selects all measures for allowed actions
  11. **Deselect All:** Removes the selection of all measures
  12. **Expand All:** Expand all lower level measures in the hierarchy not displayed
  13. **Collapse All:** Collapse all lower level measures in the hierarchy displayed.
- 📖 **Note:** A lock symbol displayed to the left of the measure means the measure is locked by OFM Operations. A draft copy of the measure can be updated, but not submitted.



## Edit Checks

Edit checks are automatically run on performance measures when submitted for approval, or they can be done at any time. Multiple performance measures can be selected and run at once or one at a time. A generated report will populate when the edit check is complete.

There are informational messages in the report that list the assigned number of each edit checked performance measure. The report also generates the results of the edit check. The two error types are:

- **Critical:** Errors that require updates or corrections prior to submission
- **Warning:** Important fields or sections have been missed. These errors should be reviewed for errors or exclusions, but updates are not required for submission

📖 **Note:** If critical errors are found in a performance measure, none of the selected performance measures will be submitted. The performance measures will remain selected (checked) for resubmittal and can be resubmitted after the errors are corrected.

## Edit Check Report Guide:

<b>Edit Check #</b>	<b>Message Displayed on Error Report</b>	<b>Error Type</b>	<b>Usage Type</b>	<b>Section error is located</b>	<b>Edit check activity</b>
1	Performance measure ##### does not contain an active contact to receive e-mail notification for the lead agency. A minimum of one active contact must exist in the Additional Details section of the performance measure for the lead agency.	W	Official and Internal Usage Types	Additional Details	At least one active contact marked to receive e-mail notification for the lead agency per performance measure.
2	Performance Measure ##### does not contain a Description. This field is located within the Definitions section of the performance measure.	W	Official usage types	Definition	When the Description field is blank, warning message is displayed.
3	Performance Measure ##### with a Budget usage type must be associated to a minimum of one Activity. This field is located within the Associations section of the performance measure.	C	Official usage types of Budgets only	Associations	A budget performance measure must have at least one activity from the current biennium associated with the lead agency.
4	Performance Measure ##### contains a Geographic Location – Latitude outside the valid range of 45.523104 and 49.023879. This field is located within the Additional Details section of the performance measure.	W	Official usage types	Additional Details	Must be within the boundaries of WA state. Only one message per performance measure will display if multiple Geographic Location – Latitude entries exist with errors for the measure.
5	Performance Measure ##### contains a Geographic Location - Longitude outside the valid range of - 116.791626 and - 124.807591.	W	Official usage types	Additional Details	Must be within the boundaries of the state. Only one message per performance measure will display if multiple Geographic Location – Longitude entries exist for the measure.
6	Performance Measure ##### does not have a Measure Type selected.	W	Official Usage Types	Definitions	When a measure type of Input, Output, Outcome, Process-Efficiency, or Caseload-Workload has not been selected
7	Performance Measure ##### must have a Unit Type selected.	C	Official and Internal Usage Types	Tracking Data	When a unit type of Percentage, Dollar, or Number has not been selected this critical message will be displayed.
8	Performance Measure ##### has an actual amount without a Target amount for Period XXX.	W	Official Usage Types	Tracking Data	If an actual exists for a period, then a non-blank target must exist too. Only one message per period(s) where an error exists will display.
10	Performance Measure ##### must contain a minimum of one CFDA Number for the usage type of Economic Recovery.	C	Official Usage Type of Economic Recovery only.	Uses	One CFDA (Catalog of Federal Domestic Assistance) number must be selected for performance measures with the usage type of Economic Recovery.
11	The edit checks were run on the following Performance Measures: #####, #####,	I	Official and Internal Usage Types	Definition	Lists the Performance Measure number(s) the edit checks were run for.

## Submit

When submitting a performance measure (or measures), the measure follows a submittal workflow. This workflow will run the prerelease edits on each measure and generate a comparison report. Each report is sent in a separate e-mail to the measure contacts. If an **Official Usage** measure is submitted, the report will be emailed to the assigned OFM Analysts as well as the measure's contact(s).

Performance measures can only be submitted if they are in **Draft** or **Returned** status. To submit a performance measure (or measures) into the workflow, place a checkmark next to the measures ready for submittal, and click on the **Submit** option.

- All critical errors need to be resolved to submit a performance measure successfully.
- When the Performance measures go through the submittal workflow, the system captures the changes required to populate e-mail prior to the status change to **Approved**.
- An e-mail with the measure's comparison report is sent as an attachment. The report lists any changes between the submitted and the last approved measure.
- OFM and GMAP analysts will not receive e-mail notifications for agency internal performance measures.
- Notification e-mails contain the agency's number, title, review action and the comparison report.
- When Performance Measures are **Submitted**, **Returned**, or **Approved** the following will be notified via e-mail: OFM and GMAP assigned analysts, agency contacts listed in the performance measure, and the agency user who submitted the performance measures.

## Open History Log

The History Log provides a list of significant actions made to a performance measure. On the Performance Measure list screen select a measure's checkbox and click on the **Open History Log** option.

Each occurrence of an action type will display on the history log report. The system will record the user name (last, first) date and time for all actions listed below

- |                                    |                          |                          |
|------------------------------------|--------------------------|--------------------------|
| • <b>Created</b>                   | • <b>Returned by OFM</b> | • <b>Marked Inactive</b> |
| • <b>Submitted - Under Review</b>  | • <b>Approved by OFM</b> | • <b>Marked Active</b>   |
| • <b>Submitted - Auto Approved</b> | • <b>Deleted</b>         | • <b>Copied to Draft</b> |

The system will record the following edit (update) actions when changes are made to the:

- |                              |                                     |                               |
|------------------------------|-------------------------------------|-------------------------------|
| • <b>Definitions section</b> | • <b>Additional Details section</b> | • <b>Associations section</b> |
| • <b>Uses section</b>        | • <b>Tracking Data section</b>      | • <b>Attachments section</b>  |

- For measures that are part of a hierarchy, it will show when a measure is linked or unlinked from a hierarchy, including its child/parent, measure number and title, time, and by whom.
- Log in history for each measure in the hierarchy when Hierarchy attributes, Roll-up or Not Roll-up target and estimates, hierarchy type (sum, average) are changed.

## Open Issues Log

The **Issues Log** facilitates communication between OFM analysts and agency analysts. If either analyst has questions or concerns about a performance measure the **Issues Log** allows an analyst to open a conversation within a measure.

### Issues Log Options:

- **Add Issue** – used to add a new issue item.
- **Add Response** – used to add a response to an existing issue.
- **Toggle Resolved** – used after selecting the issue to be marked resolved.
- **Update Email Contacts** – used after selecting the issue to view and update email contacts for the issue.

## Add an Issue:

1. Select the checkbox for the **measure**, click on the **Open Issues Log**.
2. **Add Issue:** to enter a new issue for the performance measure.
3. **Issue Title:** Add a title which will be displayed on the issue screen.
4. **Internal Issue:** check **Internal** if this issue is not intended to be a dialogue with your OFM Analyst, only your agency will be able to view Internal issues.
5. **Issue Text:** Describe issue, error, questions, or concerns of what needs to be resolved.
6. **Attachment:** If a document will help to resolve or explain the issue.
  - **Title:** Displayed text for attachment
  - **Browse:** To locate the file
  - **Add:** To add the attachment to the issue.
7. **Select e-mail recipients for the issue.**
  - **Ellipses (...):** At the end of the email line will open a list of contacts. The contacts listed are those individuals who have RPM access for your agency.
  - **OFM Analysts:** Are automatically listed as recipients for the issue. Remove any e-mail addresses that should not be notified.
  - Add additional e-mail addresses by typing in the e-mail address manually.
  - If email contacts are added when an issue is added or responded to the contact is added to the performance measure.
8. **Save:** Saves the added issue to the performance measure.
9. **Close:** After work in the issues log for the performance measure is complete.
  - 📖 **Note:** If the issue is the first for a measure, click on **Load Data on the Performance Measure List** screen to view the folder icon for the measure. A refresh is needed to view the recent change to the measure.

Expand + or Collapse – to view more details. The body of the issue can only be seen when the issue is expanded:

- **From:** Name of who created the issue
- **Issue Text**
- **Attachments:** if one was included in the **Issue Text**
- **From:** Name of who responded to the issue
- **Response Text:**
- **Attachments:** if one was included in the **Response Text**
- **Date:** Of Response

📖 **Note:** When an open issue exists for a performance measure, a tab is displayed within the Performance Measure detail screen. By selecting the **Open Issues Log** tab a response can be added to the issue or an issue can be added. A new window will open and display the Issues log and allow for updating to continue in the measure.

The screenshot displays the 'Review Issues for' interface. On the left, a list of issues is shown with 'Add Issue' and 'Add Response' buttons highlighted. On the right, the 'Add Issue' form is visible, featuring fields for 'Issue Title', an 'Internal' checkbox, an 'Attachment Title' field, an 'Attachment File' field with a 'Browse...' button and an 'Add' button, a 'Remove' button, an 'Email Notify' section with an 'E-Mail Notify' field and a button, and 'Save' and 'Cancel' buttons at the bottom.

## Action Plans

Performance measurement makes accountability possible. It attempts to answer a simple question: “Are we making progress towards achieving our targeted results?” A credible answer to this question is backed by evidence, which comes from performance measures. Information about the effectiveness of a budget activity is important to gauge whether the investment is worth the cost. Analyzing performance can help agencies and budget analysts learn how to improve that performance and whether other strategies can contribute more toward statewide results.

Action Plans provide the ability to manage and track the progress of actions, the steps or activities that will be performed for a strategy to succeed. The Action Plans section of RPM allows for the update and deletion of the plan for improved performance.

### Action Plans do:

- link to one or many performance measures, regardless of usage type
- link to multiple performance measures within the Additional Details of an open performance measure

### Action Plans do not:

- Exist without an association (linked) to a performance measure.
- Tie to a workflow, changes to the action plan will be displayed in all status instances of the performance measure.
- Have a workflow status, only the performance measure(s) it is linked to will have a workflow status.

## Adding an Action Plan

The **Action Plans** tab lists all plans under the lead agency or a partnership agency of the plan. Action Plans that have been established, can be managed from the **Action Plans** tab and in the associated performance measure under the **Additional Details** section.

**Note:** The below **Action Plan Filter**, **Options**, and **Columns** are the same in both Action screens with the exception of **Add** which is only in **Additional Details**.

### Action Plan Filter:

- **Show Filter:** Update filter to show plans by status: **Not Started**, **In Progress**, **Completed**, **Deferred**, **Waiting for Information**


**Note:** Select a status and click on **Filter Data** to load preference.

**Action Plan Options:** Available depending on the status of the plan and if an action plan has been created.

1. **Update:** Perform a variety of operations on one or more action plans. By selecting the checkbox(s) for a performance measure then the Update button.
2. **Open History Log:** select the checkbox for an action plan, then the Open History Log button to view the historical actions related to the action plan.
3. **Delete:** If the action plan is linked to more than one performance measure, a message will be displayed listing all performance measures.

The screenshot shows the 'Action Plans' interface in RPM. At the top, there are navigation tabs: Performance Measures, Action Plans (selected), Scenarios, Themes, Reports, and Settings. Below the tabs, there is a 'Filter Data' button and a 'Reset Default Filter' button. A 'Status' filter menu is open, showing options: All (selected), Not Started, In Progress, Completed, Deferred, Waiting for information, and Needs Attention. Below the filter menu, there are buttons for 'Update', 'Open History Log', 'Delete', 'Clear Sort', and 'Reset Default Sort'. The main area contains a table with the following columns: Locked, Lead Agency, Partnerships, Number, Title, Completed Date, Status, Budget, Economic Recovery, GMAP, Puget Sound, Internal, and Person Responsible. The table has two rows of data. At the bottom, there is a pagination bar showing '(Page 1 of 1)' and 'Rows Per Page: 10'.

Locked	Lead Agency	Partnerships	Number	Title	Completed Date	Status	Budget	Economic Recovery	GMAP	Puget Sound	Internal	Person Responsible
<input type="checkbox"/>			105	000775	Activita	8/18/2021	Completed					
<input type="checkbox"/>			105	000777	New Action Plan		In Progress					

 **Note:** Only action plans with one usage type and your agency is the lead for the action plan can be deleted.

4. **Clear sort:** Removes column sort order
5. **Reset Default Sort:** Sets the sort order back to the lead agency set preferences
6. **Rows Per Page:** Defaults to 10, can be updated to 20, 30, or show all. Depending on the number of items, loading can be slow.

#### Action Plan Columns:

1. **Locked:** Indicates if the action plan is locked. Action plans linked to a locked measure will be locked and cannot be updated. OFM Operations can perform a lock and unlock of the performance measure.
2. **Lead Agency:** Lead agency of action plan.
3. **Partnerships:** Contributing agencies to the action plan.
4. **Number:** Action plan number.
5. **Title:** Action plan title.
6. **Due Date:** Action plan completion date.
7. **Status:** Current status of action plan.
8. **Budget:** Usage type indicator for action plan.
9. **Economic Recovery:** Usage type indicator for action plan.
10. **GMAP:** Usage type indicator for action plan.
11. **Internal:** Usage type indicator for action plan.
12. **Person Responsible:** Individual responsible seeking a resolution to the action plan.

### Manage Action Plans

When an action plan is created in a performance measure, it can be managed from the **Action Plans** tab on the top of the screen. To add a new action plan, select the performance measure and **Update** or if the performance measure is open, go to the **Additional Details** section and scroll to the bottom of the page.

- **Add:** add a new Action Plan, a new screen will populate for the Action Plan Details

#### Actions in Details Screen (Create or Manage an Action Plan):

- **Number:** Action Plan number, system generated and read-only
- **Title:** Action plan title should describe the Action Plan goal
- **Description:** A statement or narrative describing the action plan. Including a specific task of what will be done, by whom, and by when. Any details or further description about the task.
- **Purpose:** A statement or narrative describing the purpose and goals of the action plan
- **Start Date:** Date the action plan will be started by.
- **Due Date:** Date the action plan is expected to be completed by.
- **Status:** Current status of the task, required to add and save an action plan.
- **Status Date:** based on the last update of the action plan.
- **Status Comment:** Comments on the current status of the action plan task to be updated for future forums.
- **Associated Performance Measures:** linked performance measure(s) that give context, contribute, or affect to the action plan, including the current measure open. The performance measure fields displayed:
  - **Lead Agency**
  - **Partnership**
  - **Number**
  - **Title**
- **Agencies:** Select a lead agency (default agency is assigned agency), only lead or partnership agencies of the linked performance measures are listed as options
- **Usage Type:** One usage type is required; only currently linked usage types are listed. Once selected, click on **Set/Unset Supported**.
- **Contact:** Set the **Person Responsible**, only agency contacts in linked measures are available. Person Responsible is required to save the measure. Secondary contact can be added using **Set/Unset Secondary Contact**.
- **Save Action Plan**



Performance Measures > Manage Performance Measure > Manage Action Plan

Apply Save Reset Cancel

Action Plan: [New] - [No Title]

Number  
[New]

Title

Description

Purpose

Start Date  Clear

Target Due Date  Clear

Completed Date  Clear

Status  
Not Started

Status Date  
5/1/2023 Update

Status Comment

Associated Performance Measures

1 Record

Clear Sort Reset Default Sort

Lead Agency	Partnerships	Number	Title
105		002985	Test

Agencies

1 Record

Filter Data Reset Default Filter

Lead and Partnership Agencies Only

Set Lead Set/Unset Partnership Clear Sort Reset Default Sort

Lead	Partnership	Code	Title
<input type="checkbox"/>	<input checked="" type="checkbox"/>		105 Office of Financial Management

Usage Types

1 Record

Set/Unset Supported Clear Sort Reset Default Sort

Supported	Title
<input type="checkbox"/>	Budget

Contacts

9 Records

Filter Data Reset Default Filter

Assigned Contacts Only

Set Person Responsible Set/Unset Secondary Contact Clear Sort Reset Default Sort

Person Responsible	Secondary Contact	Agency	First Name	Last Name	Phone Number	Email Address	Active
--------------------	-------------------	--------	------------	-----------	--------------	---------------	--------

**Action buttons:**

- **Apply:** records the action plan changes and remain on the current screen.
- **Save:** records the action plan changes and return to the pervious screen.
- **Reset:** resets any changes made and remain on the current screen.
- **Open History Log:** Navigates to the history log of action plan changes. Following actions will be recorded for the action plan:
  - When the action plan is created:
  - When the sections of the action plan are updated:
 

▪ <b>Action Plan Title</b>	▪ <b>Action Plan Purpose</b>	▪ <b>Action Plan Partnership Agency</b>
▪ <b>Responsible Individual</b>	▪ <b>Action Plan Status</b>	▪ <b>Action Plan Due Date</b>
▪ <b>Action Plan Agency</b>	▪ <b>Action Plan Status Comment</b>	
▪ <b>Action Plan Description</b>		
- **Delete:** Delete the current record.
- **Cancel:** Discard changes and return to the previous screen.

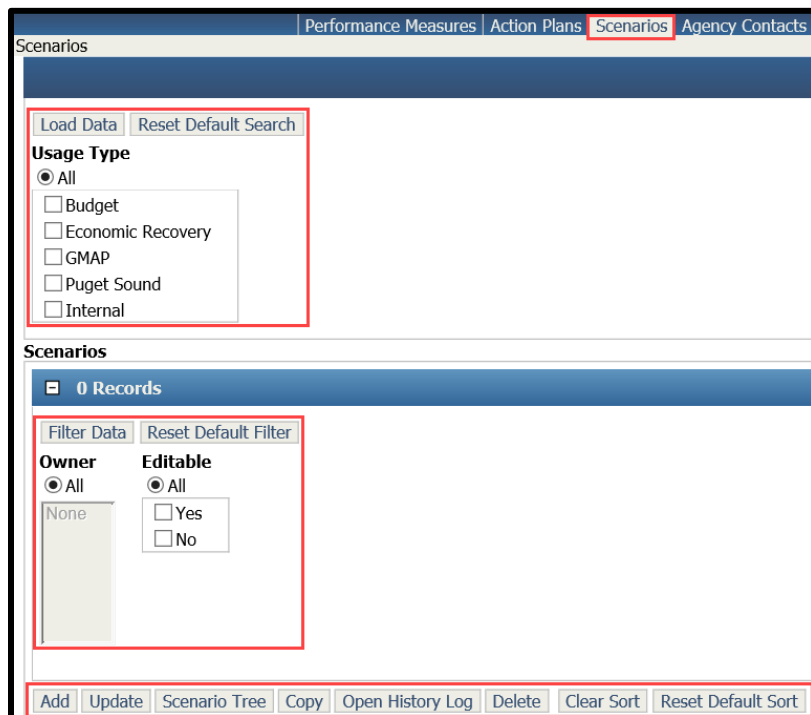
## Scenarios

Scenarios can group related performance measures by Topics, Subtopics, and to each other to create a drilldown relationship. Links can be added between performance measures to define correlations and connections. Linked measures provide a means to group measures in like categories. More information can be found in the [OFM Performance Measure Guide](#) under **Logic Models**.

**Note:** Linked measures do not have a mathematical roll-up of tracking data. Measured data elements are not derived, and tracking data is not summed or averaged for linked measures in a scenario.

### Add a Scenario

1. Enter into the Scenario screen from the **Scenario** top tab.
2. Select the **Usage Type; Budget, Economic Recovery, GMAP, Puget Sound, Internal**
3. **Load Data**
4. **Scenario Records;** Filter by **Owner** or if the Scenario is **Editable**. If there are no scenarios, skip the filter.
5. **Add:** Click on the **Add** tab to add a new Scenario and follow the [New Scenario Details](#) to complete the addition.



If there are existing Scenarios other options are available, select a Scenario to:

1. **Update**, if allowable by permissions
2. **Scenario Tree**; View an outline from the scenario measures within the same topic and subtopic
3. **Copy**: Copy an existing scenario, if allowable by permissions;
  - A new scenario number is assigned with the new create date
  - Owner name is updated to creator
4. **Open History Log**: select the checkbox next to the scenario, then the **Open History Log** button to view the historical actions related to the action plan.
5. **Delete**: If allowable by permissions, a confirmation message will populate to confirm delete action.
6. **Clear sort**: Removes column sort order
7. **Reset Default Sort**: Sets the sort order back to the lead agency set preferences


The **Scenario Grid** displays the following columns for more information on existing scenarios

1. **Owner**: Scenario creator
2. **Owner Agency**: Agency code which creator is with
3. **Participating Agencies**: All agencies listed as a lead or partnership for the measures included in the scenario.
4. **Number**: Scenario number, automatically assigned by the system
5. **Title**: Scenario title
6. **Budget, Economic Recovery, GMAP, Puget Sound**: a checkmark indicates every usage type selected for that scenario
7. **Internal**: A checkmark indicates the scenario is set to internal usage
8. **Editable**: A checkmark is displayed if the scenario is editable
9. **Has Drilldown**: A checkmark is displayed when the scenario contains topics, subtopics, or linked performance measures.

Owner	Owner Agency	Participating Agencies	Number	Title	Budget	Economic Recovery	GMAP	Puget Sound	Internal	Editable	Has Drilldown
	105		00011	Test 2	✓					✓	
	105		00010	Test	✓					✓	

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### New Scenario Details:

1. **Number**: Automatically assigned based on system tracking
2. **Title**: Created name for the scenario
3. **Inside My Group Access**: Private, Read-Only, Editable. Defines the security rights to the scenario for other users in your agency with RPM security access.
4. **Outside My Group Access**: Private, Read-Only, Editable. Defines the security rights to the scenario for other users outside your agency with RPM security access.
5. **Owner**: Lists the name of the owner of the scenario.
6. **Agencies**: Read-only display. A checkmark will display under the Owner column for the agency of the scenario owner. A checkmark will display under the Participating column for all agencies listed as lead or partnership for the measures included in the scenario
7. **Usage Type**: One or many usage types can be included for the scenario. Identifies the business process the scenario supports. Set the **Supported Usage Type(s)**.
  -  **Note**: The usage type of the scenario can be different from that of the performance measures included in the scenario. Performance measures with any usage type can be included in the scenario. Once an **Official Usage Type** has been added to a scenario, it cannot be removed by any Agency user, an OFM Operations user needs to remove the official usage type.
8. **Topics**: A scenario can have as many topics as needed, Performance Measures can be linked and/or subtopics created for a selected topic.
  - **Add**: Create a Topic for a scenario, if there is unsaved data, select Apply to save changes prior to adding a topic. See [Topics and Subtopics](#) for more details

- **Update:** Update the details of an existing scenario
- **Reorder:** The display of topics and subtopics are by the listed order, reordering this list will show a preview of the update, to finalize a reorder, click on **Apply**.
- **Delete:** If allowable by permissions, a confirmation message will populate to confirm delete action.
- **Reset:** Reset the grid sort order
- **Clear Sort:** Removes column sort order
- **Reset Default sort:** Sets the sort order back to the lead agency set preferences

The screenshot shows a web-based interface for managing scenarios. At the top, there are buttons for 'Apply', 'Save', 'Reset', 'Scenario Tree', and 'Cancel'. Below this is a header 'Scenario: [New] - [No Title]'. The main form contains several sections:
 

- Number:** A text input field with '[New]' as a placeholder.
- Title:** A large text input field.
- Inside My Group Access:** A dropdown menu currently set to 'Private'.
- Outside My Group Access:** A dropdown menu currently set to 'Private'.
- Owner:** A text input field.
- Agencies:** A section with a '1 Record' header, 'Clear Sort', and 'Reset Default Sort' buttons. It contains a table with columns 'Owner', 'Participating', 'Code', and 'Title'. One record is shown: 'Office of Financial Management' with a '105' code and a checked checkbox.
- Usage Types:** A section with a '5 Records' header, 'Set/Unset Supported', 'Clear Sort', and 'Reset Default Sort' buttons. It contains a table with columns 'Supported' and 'Title'. Five records are listed: 'Budget', 'Economic Recovery' (checked), 'GMAP', 'Internal', and 'Puget Sound'.
- Topics:** A section with a '0 Records' header and buttons for 'Add', 'Update', 'Reorder', 'Delete', 'Reset', 'Clear Sort', and 'Reset Default Sort'. Below the header, it says 'No records to display.'

## Adding / Managing Topics and Subtopics

A topic can be added when creating a scenario or by selected an existing scenario to update. Once the scenario is open add a Topic at the bottom of the screen, the **Manage Topic** screen opens to complete the details. There are no limits on how many topics or subtopics added to a scenario.

1. **List Order:** System added
2. **Title:** Title of the topic should be descriptive, save to continue by clicking **Apply**.
3. **Subtopic:** If a subtopic is added or needs to be added, use the action items to **Add, Update, Reorder, Delete, Reset, Clear Sort, or Reset Default Sort**. Action item details are described below. Performance measures can also be linked or managed under subtopics. Save changes by clicking **Apply**
4. **Performance Measures:** Link existing performance measures for the topic

### Topic and Subtopic Action Items

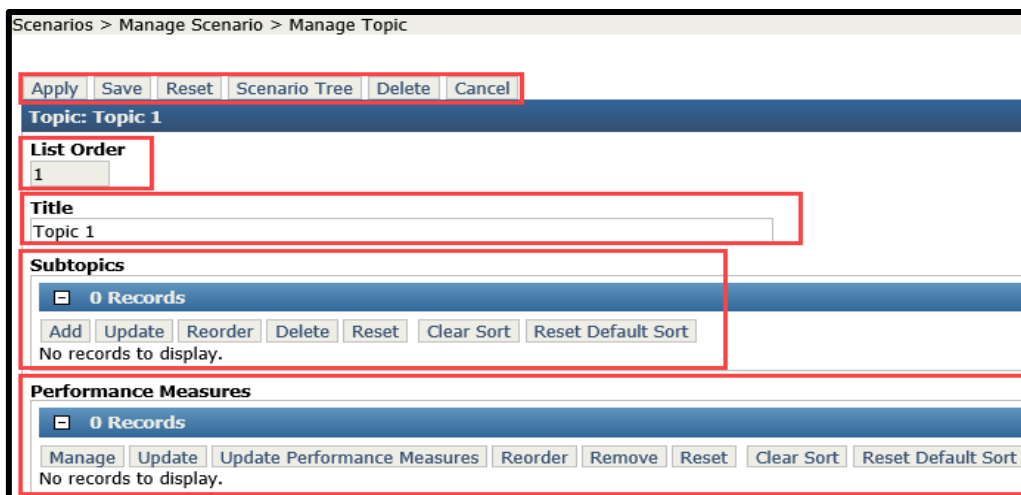
1. **Apply:** Save changes and remain on the same page
2. **Save:** Save changes and navigate to the Manage Scenario screen
3. **Reset:** Reset any list order changes
4. **Scenario Tree:** View an outline of the scenario measures within the topic and subtopics
5. **Delete:** Delete the open topic after confirming the action in a warning message
6. **Cancel:** Cancel all data in the topic and navigate to the **Manage Scenario** screen

### Performance Measure Action Items

1. **Manage:** Link or remove performance measures from the scenario.
  - On the selection of the Manage button navigate to the **Manage Performance Measures**

**Drilldowns** screen.

- Check the measure then the **Set/Unset Drilldowns** button to include a measure in the scenario. Only performance measure that the agency is lead or partnered with are available to select.
2. **Update:** Link or remove drilldown measure(s) to the performance measure
  3. **Update Performance Measures:** The **Performance Measures Details** screen opens for view and update. After updates have been completed **Save** any updates, which also closes the screen and navigates back to the **Scenario** screen.
    - 📖 **Note:** Only measures in **Draft** or **Returned** status can be updated. **Approved** and **Pending** measures will be read-only
  4. **Reorder:** Reorders the performance measures for a preview of the new order. Reordering this list will show a preview of the update, to finalize a reorder, click on **Apply**.
  5. **Remove:** Remove the selected performance measure from the scenario
  6. **Reset:** Reset the column sort
  7. **Clear Sort:** Clears the current performance measure sort
  8. **Reset Default Sort:** Resets to the system default order



## Agency Contacts

Located on the application tab bar listed at the top of the screen under the application title Results through Performance Management, the Agency Contacts tab is available to those with Agency Budget Operations security.

This feature provides a means to create and manage your agencies contacts that can be added to performance measures and action plans. Contacts can be individuals who can provide additional explanation about the measure, who should be included in measure or action plan modifications, or to help identify individual ownership of the measure or action plan.

Agency Contacts first need to be added to the Agency Contacts tab before they are available to be added for each performance measures in the measure details (Additional Details section) or added to an action plan.

Select the **Agency Contact** tab at the top of the screen and **Add**. Enter a First Name, Last Name, Email Address, Phone Number, and **Save**.

## Agency Organizations

An **Agency Organization** can be added to a performance measure in the **Associations** screen. Updates to this list is done in the **Agency Organization** tab at the top of the screen. This tab is only available to specific user types.

To add or update an **Agency Organization**, select an action item:

1. **Add:** Ability to add a new organization in the **Manage Agency Organization** screen
  - **Title:** Select a title
  - **Abbreviation:** Abbreviate the Title name
  - **Email Address:** Add the email address for the agency organization contact
  - **Organization Type:** Select from the follow types to assign to the organization:
    - **Federal**
    - **State**
    - **Local**
    - **Tribe**
    - **Other**
  - **Active:** Add a checkmark to the Active box to make the Agency Organization available in a performance measure

## Funding Sources

Funding sources are added to a performance measure in Associations section. Updates to the list of available sources is done in the Funding Sources tab at the top of the screen. This tab is only available to specific user types.

### Manage Funding Sources

1. **Active:** Add a checkmark to the Active box to view only active funding sources and filter data
2. **Add:** Adding a new funding source opens the **Manage Funding Source** Screen
  - **Code:** Generate a code for the funding source
  - **Title:** Create a title
  - **Fiscal Year Type:** Select which type of Fiscal Year for the funding
    - Calendar
    - Federal
    - State
  - **Active:** Add a checkmark to the Active box to make the funding available in a performance measure
  - **Save:** Save changes to navigate back to the Funding Sources page
3. **Update:** Update the details of an existing fund
4. **Delete:** If allowable by permissions, a confirmation message will populate to confirm delete action.
5. **Clear Sort:** Removes column sort order
6. **Reset Default sort:** Sets the sort order back to the lead agency set preferences

## Themes

Themes are added to a performance measure in the Uses section. Updates to the list of available sources are done in the Themes tab at the top of the screen. Editing Themes is only available to specific user types.

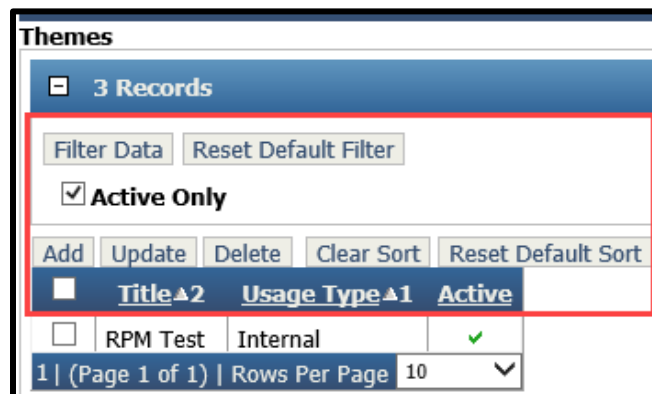
Themes are used to create custom topic areas for performance reporting and provide a way for an agency to categorize, tag, or otherwise identify measures as being associated with a certain topic. Each usage (e.g.

budget, GMAP, and internal) has different themes, and the themes listed for selection will be based on the measure's usage types.

- Mark themes as Inactive if no longer valid/relevant using the Update button.
- Internal Themes created will be unique to the agency.
- Themes can be deleted, unless it is tied to a measure, a list of the tied measures is populated when a theme is attempted to be deleted.
- Inactive themes will not be available to add to a measure.

To add or update a theme, select **Add**, enter **Title** and **Save**.

1. **Active:** Add a checkmark to the Active box to view only active funding sources and filter data
2. **Add:** Adding a new Theme opens the **Manage Themes** screen
  - **Title:** Create a title
  - **Active:** Add a checkmark to the Active box to make the theme available in performance measures
  - **Save:** Save changes to navigate back to the **Themes** page
3. **Update:** Update the details of an existing theme
4. **Delete:** If allowable by permissions, a confirmation message will populate to confirm delete action.
5. **Clear Sort:** Removes column sort order
6. **Reset Default sort:** Sets the sort order back to the lead agency set preferences



## Reports

Reports are located in **Enterprise Reporting**. There are two ways to open Enterprise Reporting.

- Enterprise Reporting from within the application on the upper right corner of the screen. This will launch ER in a new browser.
- Enterprise Reporting (ER) link in a new browser. Enterprise Reporting Links:
  - Within the state Intranet [Reporting Portal \(wa.gov\)](#)
  - Outside the state Intranet [SecureAccess Washington](#)

### RPM001: Performance Progress by Agency, Activity

This report provides information on performance measures as they relate to an agency and their activities.

- For measures in a hierarchy, only the top level measure will display.
- An asterisk ( \* ) is used to state the data is calculated from one or more lower level measures.

### RPM002: Performance Progress by Result Area, Strategy, Activity

This report provides information on Statewide Indicators and performance measures as they relate to Statewide Result Areas, Categories, and agency activities.

- For measures in a hierarchy, only the top level measure will display.
- An asterisk ( \* ) is used to state the data is calculated from one or more lower level measures.

### **RPM004: Performance Progress by Agency**


This report contains a quick view of all performance measures by agency. No version is required since the report lists measures as they relate to the agency. This report provides a quick view of an agencies performance measures.

- For measures in a hierarchy, a parameter selection on the schedule screen provides two options: only include the top level measure or include all measures in the hierarchy. A representation of the Hierarchy Tree is display within the report prior to the first measures details.

### **RPM008: Performance Measures and Activities Links**

This report provides information to the user on which activities each performance measure is linked to in a particular budget period. It is used as a tool to help users identify where critical information may be missing for reporting and budgeting.

- The Unlinked items will display first on this report, followed on the next page with the Linked items.
- For measures in a hierarchy all measures in the hierarchy will display. A representation of the Hierarchy Tree is display within the report for the measures in a hierarchy.

 **Note:** When adding the selection criteria in the Performance measure reports **Estimate** is no longer available. However, **Estimates** are maintained within the measure. **Target Data** has replaced Estimate, and an entry is needed in the **Target** fields within the measure detail **Tracking Data-Tracking Periods** section.

## **Settings**

**Settings** provides the ability to select the preferred performance measure status for measures that are part of a hierarchy or a scenario. Where more than one status exists for a performance measure the settings tab will provide for a selection of **View Approved** measure(s) or **View Unapproved** measure(s) when managing a hierarchy or scenario.

#### **View Approved:**

- Where more than one status exists for a performance measure the performance measure that has been approved will display in the hierarchy if this option is chosen.
- All performance measures with only one status will display whether or not they are approved.

#### **View Unapproved:**

- Where more than one status exists for a performance measure the performance measure that has not been approved will display in the hierarchy if this option is chosen.
- All performance measures with only one status will display whether or not they are approved.

## **Frequently Asked Questions**

### **Why measure performance?**

We measure performance to know how we are doing. Are our customers satisfied? Are we efficient? How effective are we at achieving results that matter? Performances measures help answer these questions.

Ideally, an agency should develop a common set of core measures that it can use for all management and reporting purposes. The performance measure system provides the fields to capture informational elements for Government Management Accountability and Performance (GMAP), Budget, Economic Recovery, and Agency Internal measures.

OFM's Results through Performance Management system (RPM) has been built to improve the ease and quality of measuring performance.

### **What is a performance measure?**



A performance measure is a numeric description of an agency's work and the results of that work. Performance measures are based on data and tell a story about whether an agency or activity is achieving its objectives and if progress is being made toward attaining policy or organizational goals.

In technical terms, a performance measure is a quantifiable expression of the amount, cost, or result of activities that indicate how much, how well, and at what level, products or services are provided to customers during a given time period.

- **Quantifiable:** means the description can be counted more than once or measured using numbers.
- **Activities:** mean the work, business processes and functions of Washington state government agencies.
- **Results:** are what the agency's work is intended to achieve or accomplish for its customers.

### How do I write a performance measure?

Performance measure titles should be concise and easy for everyone to understand (layman terms).

- Since performance measures are numeric descriptions of work, start each measure by clarifying the unit of measure, for instance:
  - The number of . . . The percentage of . . . The ratio of . . .
- Next, tell the reader what is being measured. This is usually an attribute of work performance identified in an activity description, expected results statement, or logic model:
  - The number of days to fill a job vacancy . . . The percentage of trainees finding a job . . .
  - The ratio of wetland acres cleaned of invasive species . . .
- Finally, when possible, use the word "per" to clarify the reporting cycle:
  - Average number of days it takes to fill a posted job vacancy per quarter.
  - Percentage of trainees finding a job within 30 days of training per quarter.
  - The ratio of wetland acres cleaned of invasive species per year.

A performance measure title should not include explanations of why the measure is important or how the data is collected. Those comments belong in the Relevance field or Operational Definition field.

- Avoid jargon and acronyms in performance measure titles, so readers who are not subject matter experts can understand what is being measured.
- Don't word performance measures as objectives. Objective statements include words such as "increase" or "decrease," which imply change. Objective statements are not performance measures, although performance measures can tell us whether we are meeting our objectives.

Current Performance Measure requirements can be found in [Budget instructions - operating and transportation | Office of Financial Management \(wa.gov\)](#)

### How do I change the Frequency of a Measure?

The performance measures frequency will be tied to each tracking biennia within the measure. A performance measures frequency cannot be changed when tracking biennia exist for the draft measure.

All tracking biennia first needs to be deleted from the draft performance measure prior to changing a measures frequency. (To delete use the *Delete Biennium* button in the Tracking Data section of the measure details)

An Export feature is provided within the system to help in a measures frequency conversion, all tracking biennia data can be exported if needed.


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### How do I find the Tracking Biennia that is not displayed for my measure?

Ensuing biennia are not automatically added to the measures Tracking Period biennia dropdown list. This will be a step taken by the agency for each measure in need of the new biennia.

### How do I update Tracking Biennia for a single measure

On the Performance Measure List screen **check the draft** (or returned) **measure(s)** that need additional biennia, **then the Tracking button.**

- On the Mange Tracking Amounts screen, **select the “Create Biennium” button** at the top of the screen. Select the Biennium from the list box, and then Select the Create button.
  - Complete these steps for each measure in need of the new biennia. **Note:** if multiple measures were selected, use the navigation arrows to advance to the next record to update the Tracking Periods section.
-  **Note:** After the above steps have been completed, select the Biennium from the dropdown list then the Filter Data button to switch between biennia in the Tracking Periods section.

## Additional Information – Help Desk

For additional information about RPM please contact the OFM Help Desk at [HereToHelp@ofm.wa.gov](mailto:HereToHelp@ofm.wa.gov) or call 360.407.9100

